The Commonwealth of Kentucky

kynect

benefits

Quick Reference Guide
Scheduling Appointments

This Quick Reference Guide is designed to help kynect benefits users complete the necessary steps to schedule an appointment in kynect benefits.

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> **Please Note**: Residents who still need help after referencing this Quick Reference Guide may call **855-4kynect** (1-855-459-6328) for additional assistance.

Scheduling an Appointment

Appointments may be scheduled through kynect benefits. Appointments are scheduled from the **Appointments** tab on the **Resident Dashboard**. Clicking the **Appointments** tab opens the **Appointment Summary** screen where appointments may be viewed, scheduled, and managed. The kynect benefits users with access to schedule appointments include:

- Residents

- kynectors

- Agents

- Authorized Representatives

A link to schedule appointments is available in the **I want to…** section at the bottom of the **Home Dashboard**. These links are available for additional kynect benefits users such as kynectors, Agents, and Authorized Representatives. Additional kynect benefits users use these links to schedule appointments for Residents not in the kynect benefits system.

Follow the steps below to schedule an appointment in kynect benefits.

Steps to Schedule an Appointment

1. Click on the **Appointments** tab from the **Resident Dashboard's** left navigation panel.
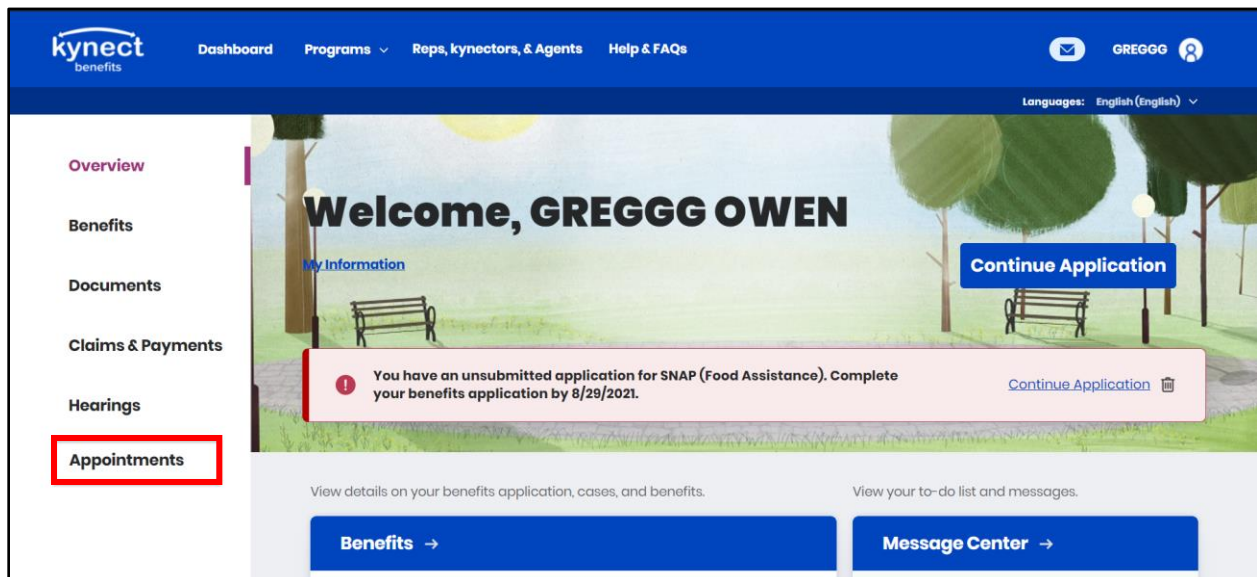
2. The **Appointment Summary** screen displays the **Schedule Appointment** button and the **Upcoming Appointments** and **Past/Cancelled Appointments** tabs. These tabs display information for upcoming and past or cancelled appointments. Click **Schedule Appointment**.

> **Please Note**: The **Reschedule Appointment** and **Cancel Appointment** links appear under the **Upcoming Appointments** tab to manage appointments. If the **Appointment Channel** is **Video**, a **Join Meeting** link appears under **Conference Link** instead of an address under **Office Location**.

> **Please Note**: Residents <u>not</u> active in the kynect benefits system cannot have video appointments scheduled for them or scheduled on their behalf by additional kynect benefits users.

Appointments

View and manage your upcoming and past appointments.

Schedule Appointment ②

Upcoming Appointments	Past/Cancelled Appointments
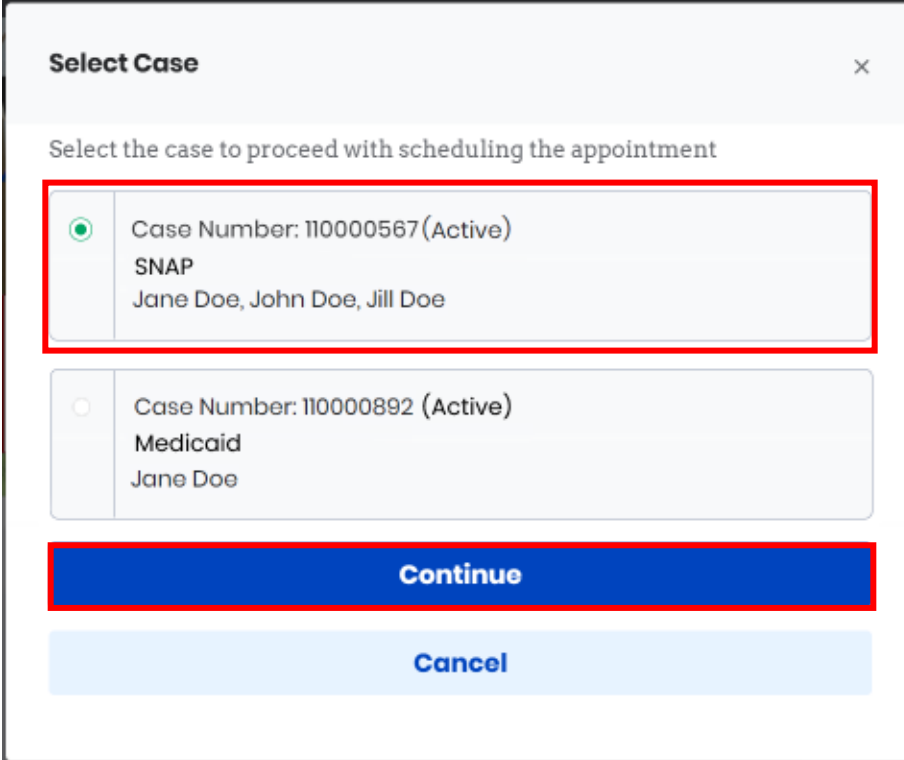
Intake – SNAP (Food Assistance), Child Care Assistance ⌃

Jane Doe,

Date	Time	Appointment Channel	Office Location
12/24/2021	12:30 PM (EST)	In-Person	24442 George Way Kentucky City, KY – 40601

Reschedule Appointment   Cancel Appointment

3. Select the radio button of the applicable case if the Resident has multiple active cases.

4. Click **Continue**.

5. Select the Resident's name from the **Member** drop-down. Once selected, the Resident's information is prepopulated, including the **First Name**, **Last Name**, **Email**, **Primary Phone Number**, and **Address**.

6. Update the **Email**, **Primary Phone Number**, and **Preferred Contact Method,** as needed.

7. Click **Next**.

8. Click the reason(s) for scheduling the appointment. When selecting an appointment, please note that:

- **SNAP Employment and Training (E&T) Assessment** and **E&T Program – General Appointment** may only be selected if the Resident is approved for SNAP E&T.

- The SNAP E&T appointments <u>may not</u> be selected along with the **Apply for Benefits** or **Renew Benefits** appointments.

- The **Renew Benefits** appointment is not displayed if there are no programs up for renewal.

9. Select the applicable appointment sub-type under the appointment reasons after selecting a reason for scheduling the appointment.

10. Click **Next**.

11. The office card displays the **Appointment Location Hours**, **Address**, **Phone**, and **Distance** from the Resident's address to the office's address.

12. Click **Next**.

13. Click the calendar icon to search for and select a date from the **Search available timeslots from** field.
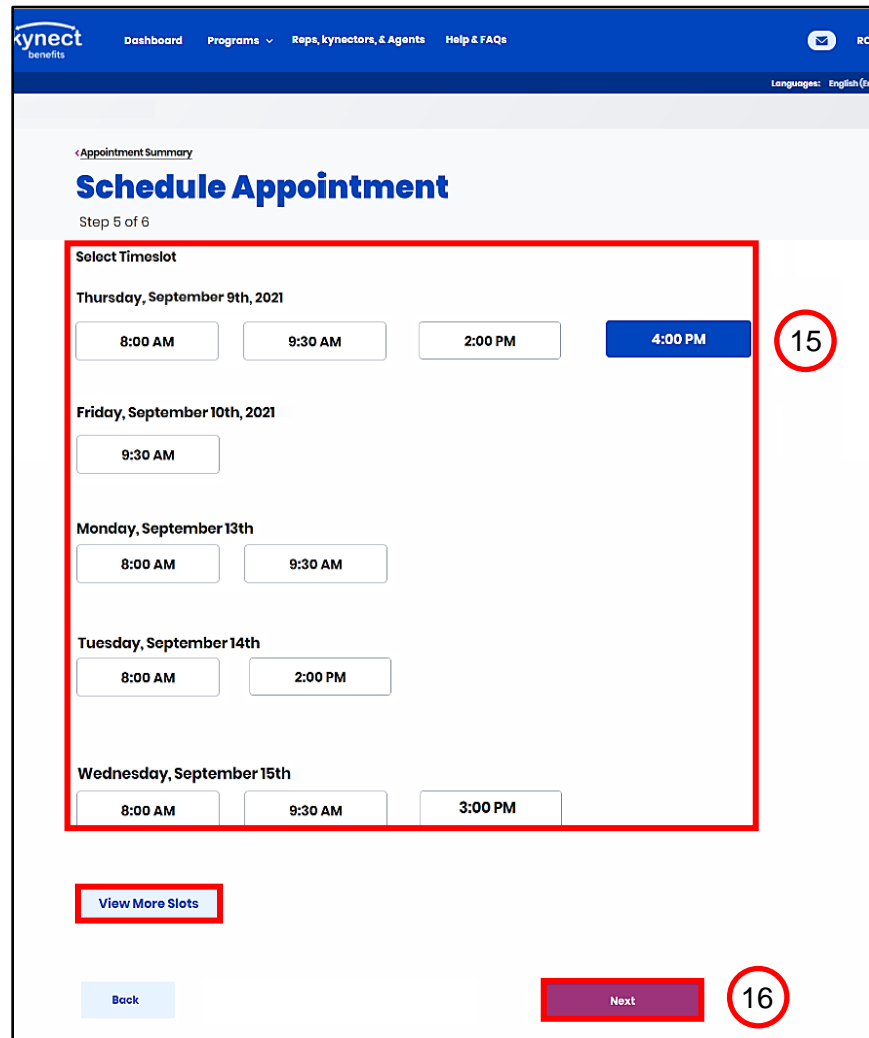
14. Click **Next**.

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> **Please Note**: The **Search Available timeslots from** field does not allow same day appointments or appointments in the next 24 hours.
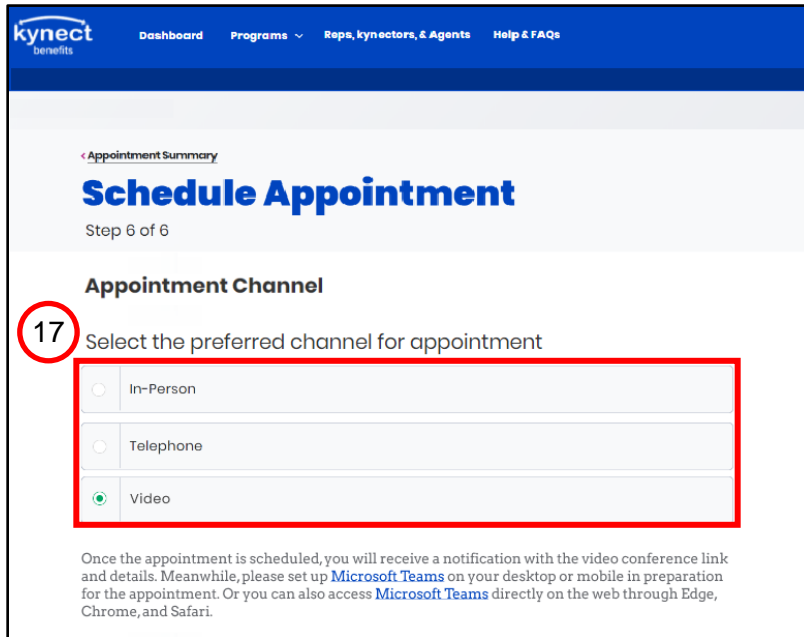
15. Select an available appointment timeslot. Click the **View More Slots** button under the last available appointment date listing to view more time slots.

16. Click **Next**.

> **Please Note**: The **View More Slots** button does not display if there are no more timeslots. The **Select Timeslot** screen does not display appointments in the next 24 hours.

17. Select the **Preferred Channel** from the **Appointment Channel** list. **In-Person**, **Telephone**, and **Video** are options from which one may be selected.
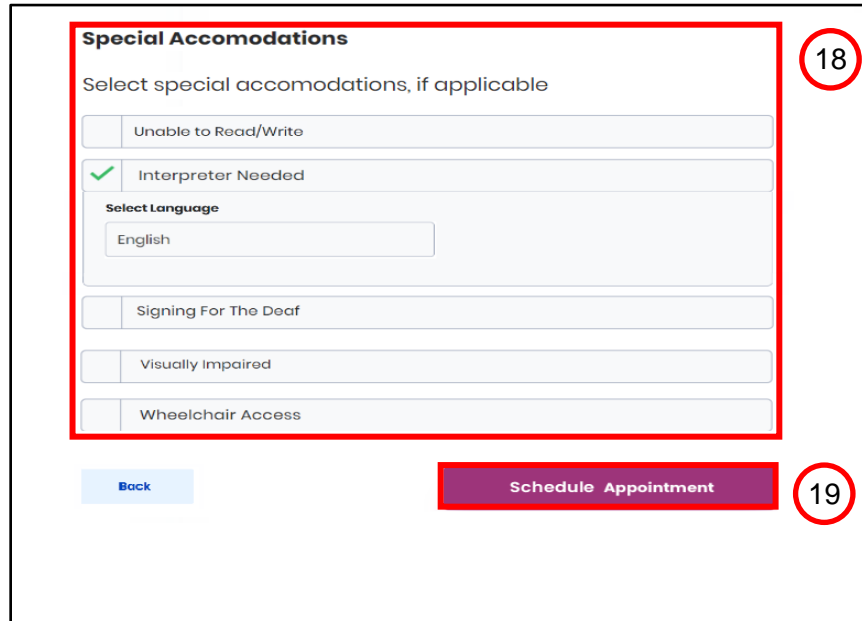

Please Note: Video Appointments may not be available for all DCBS Offices.

18. Select any applicable special accommodations from the Special Accommodations list if required by the Resident.

> 💡 **Please Note**: The **Special Accommodations** list corresponds with each preferred channel for appointment.
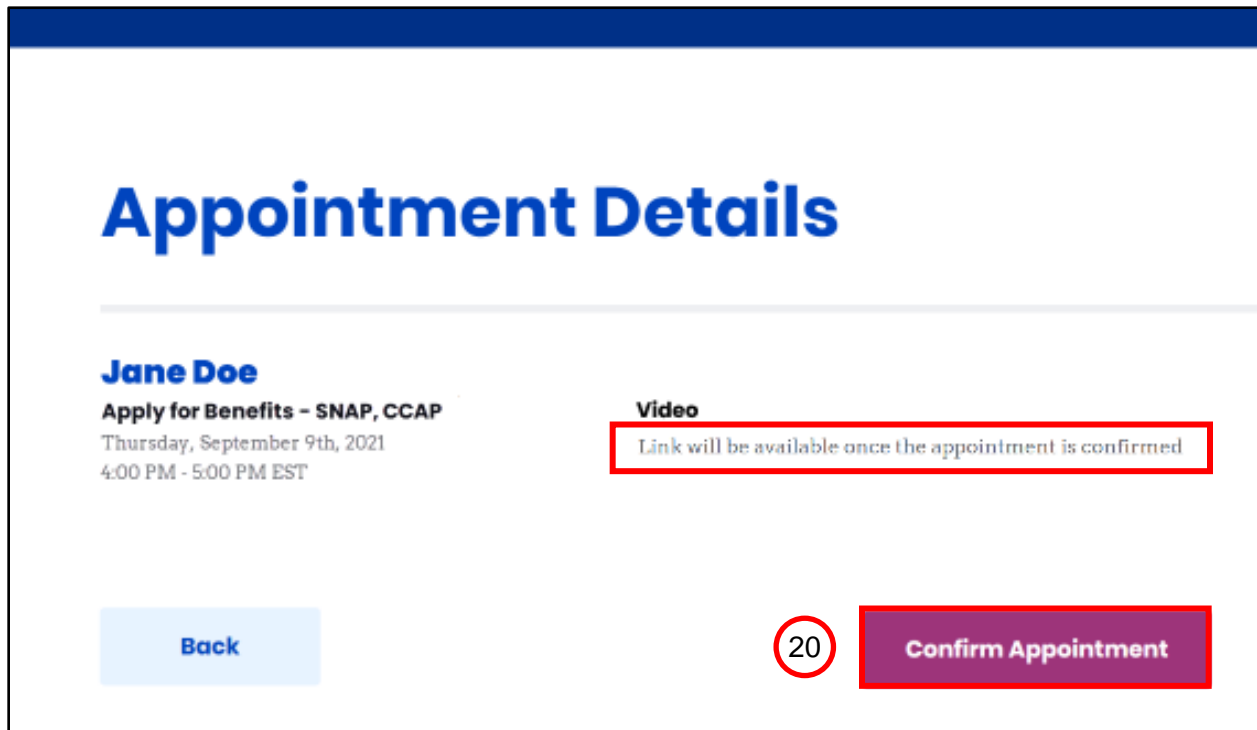
19. Click **Schedule Appointment.**

> 💡 **Please Note**: Residents and additional kynect benefits users may set up Microsoft Teams on their desktop or mobile in preparation for the appointment. Once the Video Appointment is selected and confirmed, links are provided to download Teams to a desktop, laptop, or mobile device.
>
> kynect benefits users may also click the Appointment link to access **Microsoft Teams** directly on the web through Edge, Chrome, or Safari.

20. Click **Confirm Appointment** to finalize the appointment.

21. One the appointment is confirmed the **Appointment Successfully** Scheduled pop-up displays with the confirmed appointment details. If the **Appointment Channel** is **Video**, the link to join the video displays in the **Appointment Details**.

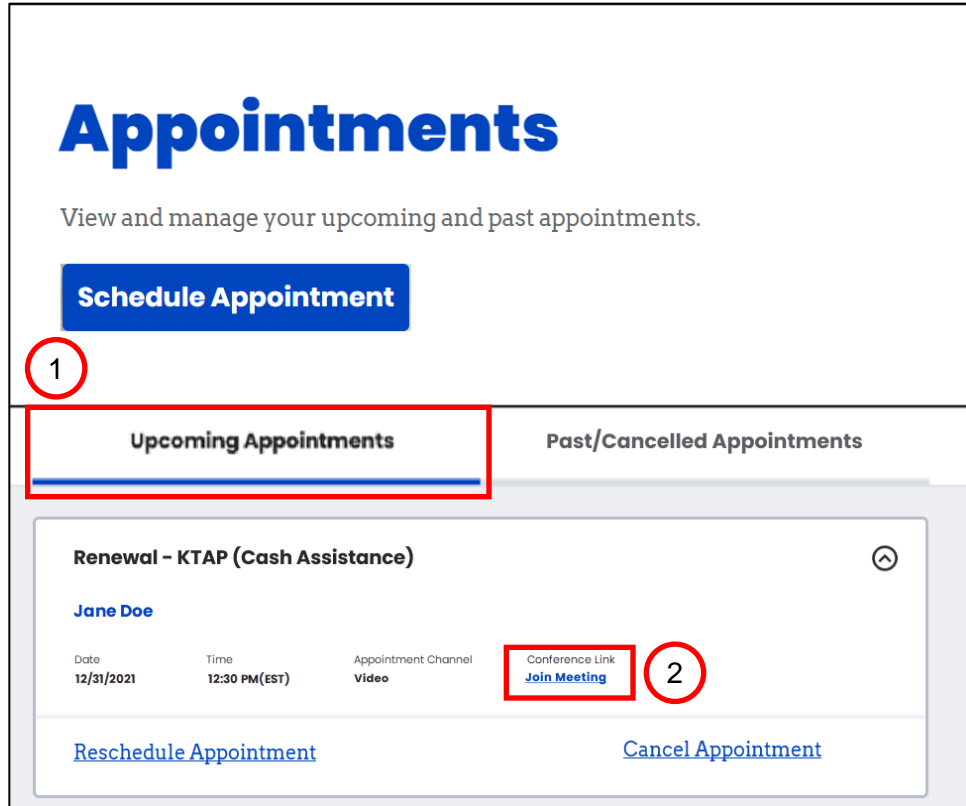22. Residents receive an email or text notification based on the preferred contact method selected in kynect confirming the appointment. If the channel is **Video** a shortened **Video Conference** link to join the meeting is sent.

> **Please Note**: If **Email** or **SMS** are chosen as the **Preferred Contact Method** a reminder Email or SMS is sent the day before with the shortened link to join the meeting.

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Steps to Join a Scheduled Video Appointment in Microsoft Teams

1. Select the **Upcoming Appointments** tab on the Resident **Appointment Summary** screen.

2. In the **Appointment Details** section click **Join Meeting**.

3. A new browser window pop-up asks how the Resident would like to join the meeting with the Microsoft Teams application. If the Teams app is installed on the device, the select **Open your Teams app**. Otherwise, select **Continue on this browser** to open the meeting.
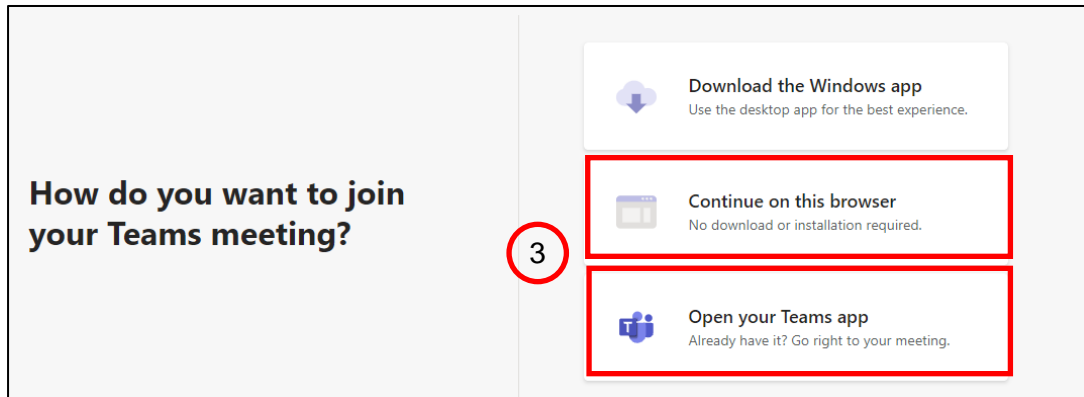
> **Please Note:** For best results, use one of the following preferred web browsers: Google Chrome, Microsoft Edge, or Safari (version 11.6 and above).
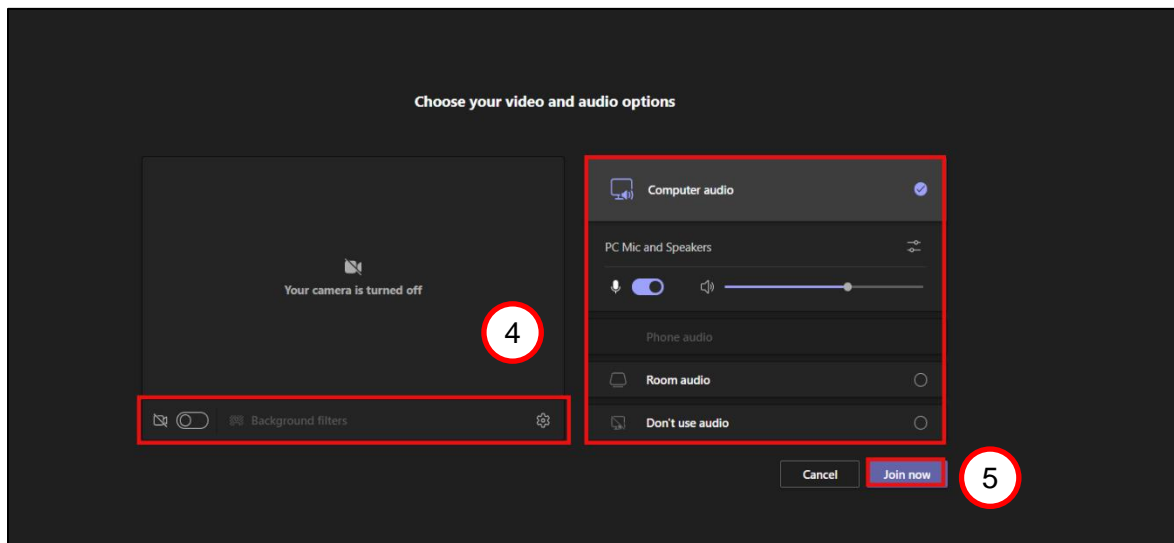> If using a non-preferred web browser (e.g. Firefox), it is recommended to use the Microsoft Teams App, which may be downloaded on the **Microsoft Teams website**. If not using a preferred browser, certain Microsoft Teams functionalities may not work as expected.

4. Enter your **Name** (First and Last) and check that the camera and microphone are toggled on.

5. Click **Join now**.

> **Please Note:** If using the Microsoft Teams App, the username automatically integrates with the App.

Please Note: Audio and video are turned off by default. The user may keep their audio/video on or off while waiting to join a meeting.

6. If waiting for the worker to join the meeting, the **When the meeting starts, we'll let people know you're waiting** or **Waiting for others to join** prompts may display.
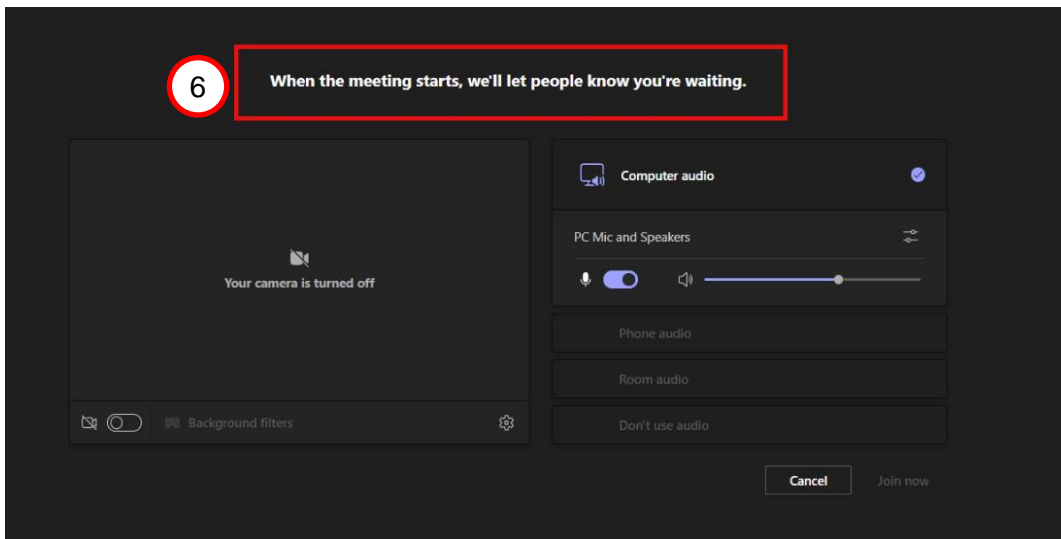
7. When the worker starts the meeting, use the menu option on the screen to turn on video and audio when ready. (See the chart below for additional functions.)
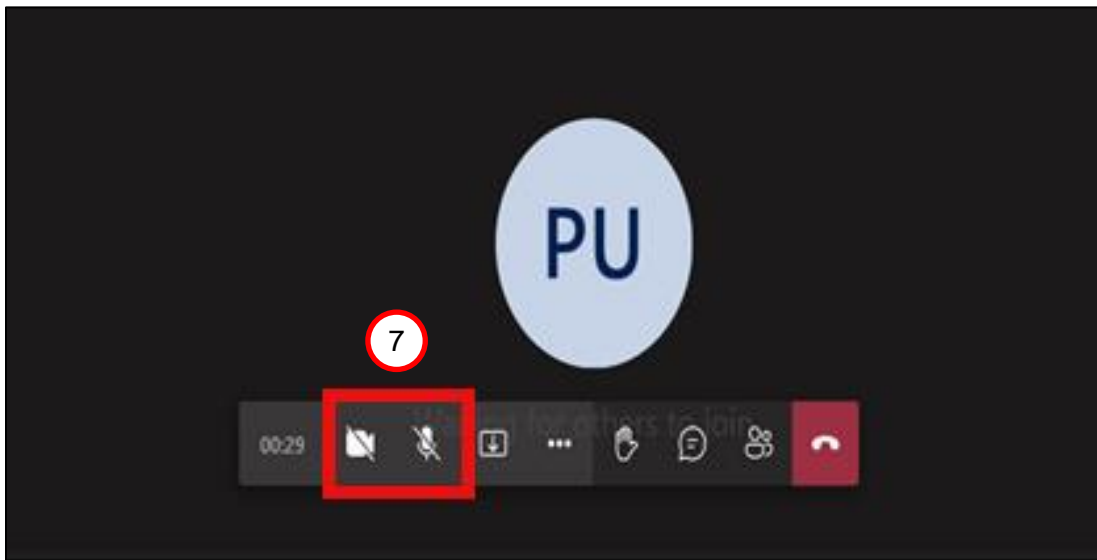
Please Note: The screen display may vary based on the device used (mobile, computer, or Microsoft Teams App).

Icon	Description
	Camera button - Turns the webcam on and off.
	Microphone button - Turns the microphone on and off.
	Arrow in box icon - Opens the Share Tray; Individuals may display their Desktop/Window (i.e., screenshare).
	3 dots button - Lists additional options (e.g., meeting details, enter full screen, gallery view, etc.).
	Talking bubble icon - Opens the chat bar.
	People icon - Displays list of attendees in the meeting.
	Red box with phone icon - Ends the meeting (do not click until the Worker confirms the meeting is over).

Please Note: Meeting Control Bar icons are subject to change pending Microsoft Updates to the Teams App.
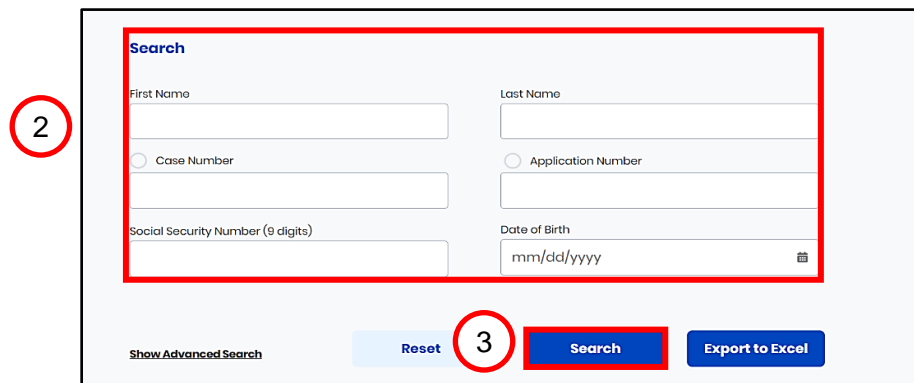
Topic	Best Practice
Video feature enabled	• Residents are encouraged to have video on if technology permits.
Screen Share/Chat	• Residents should not share their screen during Video Appointments. • Personally Identifiable Information (PII) should <u>not</u> be shared by any party in the chat feature.
Audio/Technical Issues for Residents	• Residents should anticipate a call to their designated phone number from DCBS Staff or SNAP E&T Provider if audio issues cannot be resolved during the Video Appointment. • Residents should inform DCBS Staff or additional kynect benefits users via the chat feature if audio issues cannot be resolved. • Residents should follow up with Department of Community Based Services (DCBS) and call **855-4kynect** (1-855-459-6328) if they have system functionality issues with joining Video Appointments.
Appointment Time	• Residents should remain on the call for at least 10 minutes if the kynect benefits user is late to the appointment. • After 10 minutes, Residents may visit kynect benefits to reschedule the missed appointment or call DCBS.

Please Note: Residents and additional kynect benefits users can reference the Microsoft Teams **Best Practices** table for any questions related to conducting an appointment.
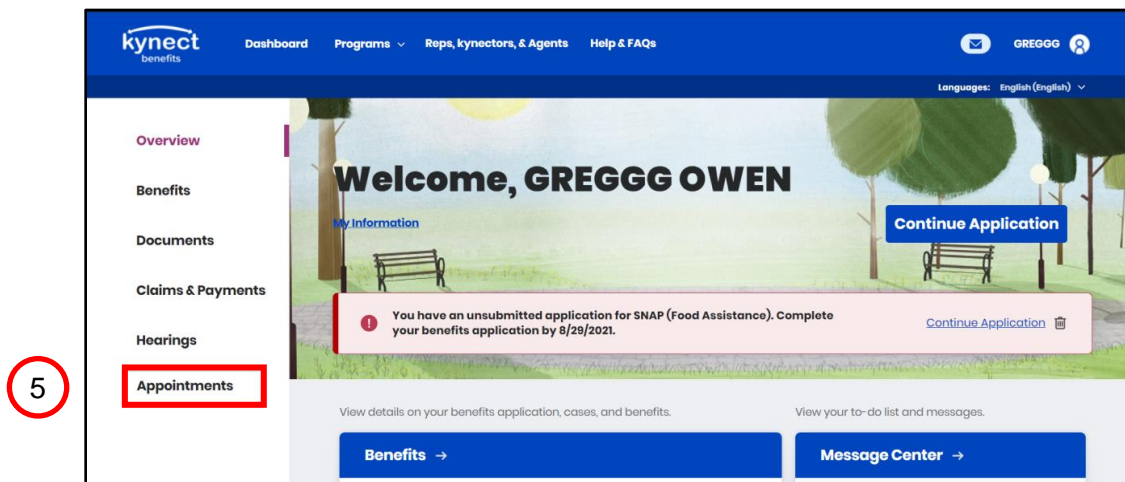
Steps for Additional kynect benefits Users to Schedule an Appointment for Residents Found in the kynect benefit System

1. Search for the Resident from the **Search** feature on the **Home Dashboard**.

2. Enter the Resident's information into each field, such as the **First Name**, **Last Name**, **Case Number**, **Application Number**, **Social Security Number**, or **Date of Birth**.

3. Click **Search**.

4. If they appear in the system click on the Resident's name to be taken to their **Resident Dashboard**.

5. Click on the **Appointments** tab in the left navigation panel.

6. Click on **Schedule Appointment** to schedule the appointment for a Resident.

Steps for Additional kynect benefits Users to Schedule an Appointment for Residents Not Found in the kynect benefit System

1. If the Resident does not appear in the system after clicking **Search** from the **Home Dashboard**, navigate to the **I want to…** section to view **Schedule Appointment**.

2. Click **Schedule Appointment** to display the **Appointment Summary** screen.

3. Follow Steps 2-21 in the **Steps to Schedule an Appointment** section of this Quick Reference Guide to begin scheduling an appointment for Residents if they are not found in the system.

I want to...

①

Prescreening Tool	**Agent Portal**
Check for potential eligibility on behalf of a client	Visit the Agent Portal to search for insurance agents.
Schedule Appointment ②	**Reschedule/Cancel Appointment**
Schedule an Appointment for contact not already in system.	Reschedule/Cancel Appointment for contact not already in system

Please Note: Residents <u>not</u> active in the kynect benefits system cannot have Video appointments scheduled for them or scheduled on their behalf by additional kynect benefits users.